ISD Action Item Tracking Log Guideline

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Purpose

This purpose of this document is to provide uniform guidance for the preparation of action item logs. If desired, this guideline may be used to track issues as well as action items.

Scope

This guideline should be used for the preparation of all action item logs intended for use within ISD.

Guideline

Each software project within ISD should establish an Action Item (AI) log. The software project defines the criteria and scope for entries into this log. In general, the AIs include all activities assigned by the Product Development Lead or Software Manager during any review of activities or products on that project. The AI log should be maintained within a controlled repository, and should be reviewed periodically at management meetings.

AI logs should be maintained as electronic documents. They may be kept in any electronic format, although a spreadsheet or database is recommended. Emails should not be used for tracking action items.

Many software projects within ISD are part of mission-level Projects. The software project may use a Project-level action item tracking log, if one exists.

Note that action items can have value as historical documents. Closed action items should not be simply deleted; it is better to move them to an archive log.

It is recommended that AI logs have a tabular format. Each log entry should contain the following fields; these will normally appear as column headings in the table:

Field Name	Description
Item number	This should be a unique number
Date opened	The date on which the AI was assigned
Date due	The date by which the AI is expected to be completed
Date closed	The date on which the AI was actually completed
Assigned to	The name of the person assigned to complete the AI
Description	A textual description of the AI
Status	The status of the AI ('open', 'closed', etc.), along with the date of the status change
Analysis	A summary of the analysis performed to determine the corrective actions to be taken to address the issue, along with the date of the analysis. When the AI is closed, enter the final analysis that led to the closure.
Corrective Action	A brief description of the corrective action planned
Notes	Any other pertinent information regarding the AI. This is an appropriate field for maintaining a chronological record of status changes and work accomplished. (This is an optional field; the column should be provided but need not always contain information.)

Measures

Several typical measures of interest related to Action Items are shown below, but the actual measures collected may vary from project to project. It is important to track whether or not action items are being closed, and how long it is taking to close out action items. In general, the number of open Action Items should be shown both at selected reporting dates (e.g., weekly) and also cumulatively. The number of AIs remaining open longer than some specified time should also be depicted. The measurement data is usually shown in a graph where the X axis is time and the Y axis is the number of action items. If there are no measures, then insert "None."

Recommended Measures:

Number of Open AIs on each reporting date (e.g., weekly)

Cumulative number of open AIs as a function of time

Number of AIs remaining open for what is considered a long time on the project (e.g., over 60 calendar days)

Tools and Templates

The following Tools are available within ISD for maintaining the action item log.

Name	Description
(No tools identified)	

Development History:

Version	Date	Description of Development Changes

History			
	0.1	Nov 12, 2004	Created initial draft of the Guideline. D. J. Schultz
	0.2	Nov. 17, 2004	Responded to review comments from Donna Szakal. D. J. Schultz
	0.3	Nov. 29, 2004	Responded to review comments from S. Godfrey, S. Sharma, L. Landis, P. Arnold, F. McGarry, and A. Centa. D. J. Schultz
	0.4	Nov. 30, 2004	Responded to additional review comments from S. Godfrey. D. J. Schultz
	0.5	Dec. 6, 2004	Responded to additional review comments from B. Decker, L. Landis, and M. Tilley. D. J. Schultz
	0.6	Dec. 8, 2004	Incorporated actual document number (021), and responded to additional comments from L. Landis and D. Szakal. D. J. Schultz
	0.7	Jan. 24, 2005	Responded to CCB review comments
	0.8	Jan. 25, 2005	Negotiated improved wording in response to CCB Comment #3 from S. Green.

Change History	Version	Date	Description of Improvements
	1.0	Jan. 26, 2005	Initial approved version by CCB